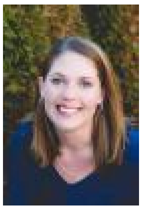
Project Status, Oct 30 [1]



November 22, 2015 by Kim Egan [2]

The data loads are about half-way complete and are slated to complete sometime next week. Kudos to Lisa Carr and others at UIS for loading, monitoring and fixing eComm data all week long.

We are about 75% complete with the build out of our custom email preference centers, thanks to the great work of our sub contractor, NimbleJack. We are considering the costs and resources required to complete the remaining 25% work. Our options are to ask NimbleJack to do the work (costs associated) or keep the work in-house (limited resources because of the short window). Either way, the work needs to be done by Nov 6 so there's a bit of a sprint in this area.

Phase 1 (Salesforce and email marketing) user testing is being revisited to expand our test scripts to reflect a more holistic view of the eComm requirements. Having comprehensive test scripts not only ensure the functionality works, but it provides a training opportunity as each script articulates step-by-step instructions to achieve a desired result. If the desired result is not achieved, the test fails. By way of going through the detailed instructions, we learn about the solution on a more detailed level.

The alumni community is moving on to the testing phase. Matt Duncan and Melissa Cech will spearhead this effort because they provide the best community management insights. The MECs will support them through testing activities. There are some remaining "final touches" to do in the community (eg; images and links, etc.), but we believe these should be added closer to launch time, which is currently slated for next year (fall likely). After testing, we will fix issues and then move on to training. With that, the community portion of eComm phase 1 will essentially close out.

We continue our focus on report-building and plan to have a couple dozen reports built out next week. Matt Roush, who seems to have the best understanding of report creation, has agreed to develop a how-to document that will aid the MECs in our report-building. Huge thanks to Matt for his expertise!

The MECs are assigning security packages to users and will have this complete by next week so the COE can provision our ~300 users over the next few months.

Kalman Sweetwine (our CoE business analyst), Kyle and I have been working with the

Controller and Treasury teams on the CU and Foundation sides to address processes around event registration forms that accept credit card transactions. I think Cvent will support many of the requirements, with the exception of integrating our Internet Merchant Accounts (IMAs) with Peoplesoft - this will likely be a future implementation and will require UIS' involvement. Conversations continue next week.

We met with the COE and Vertiba yesterday and received our first training/introduction to Cvent. I think I can speak for everyone when I say that there is a lot of excitement around this tool. In addition to the fact that there are so many great features that Harris does not offer, it appears to be intuitive and fun to use! The MECs will be conducting the first of two sets of tests next week. Results are due by Nov 6.

Melanie Jones and I had our second meeting with Normandy Roden, Travis Chillemi and Michael Edwards to discuss the eComm video. I couldn't be happier about the direction and vision that we collectively agreed to. More to come, but an enormous thank you to Normandy, Travis and Michael for taking this project on and doing so with such enthusiasm.

We're working through details for eCommference (user training in January) and assessing venues, associated costs and agendas - lots of logistics.

Finally, we are putting the final touches on an email communication that will go out next week.

View the Project Management Update, 10/30 [3]

eComm_eCRM-status-update_20151030.pdf [4]

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